

A Work Project, presented as part of the requirements for the Award of a Master's degree in Management from the Nova School of Business and Economics.

Can affirming Ultra Suave as the most natural brand in the mass market make it the market leader in Portugal?

Report B: What can Ultra Suave do in order to succeed in the natural products driven consumer segment vs. Fructis and Herbal Essences?

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Work project carried out under the supervision of:

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02-01-2021

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1. Introduction

Ultra Suave is the number one brand in the natural segment of the hair care market, with 14.2% MS. The natural segment makes up 30% of the total hair care market, and although having registered a decrease of 1.4% in the first quarter of 2020, it is expected to grow in the long term (Briefing L'Oréal Portugal, 2020).

In this individual work question, the *natural products driven consumer segment* is analysed. This is because they are the most engaged with the hair care category for reasons concerning products' compositions having natural ingredients. Furthermore, the focus of the analysis is on Ultra Suave's main competitor natural brands Fructis and Herbal Essences, both also belonging to the natural segment of the hair care market.

Fructis was created in 1996, and, like Ultra Suave, is a daughter brand of Garnier. When entering the market, Fructis was "the first fortifying shampoo with ingredients extracted from fruits, revolutionising the hair care market with its famous green bottles" (Garnier Portugal, A, 2020). Fructis' product characteristics assure that the hair becomes stronger, denser, and with a more healthy glow. The brand's values are aligned with Garnier's values, as is the case for Ultra Suave (L'Oréal, 2020). In terms of the brand's product range, Fructis has always had its iconic green shampoo and conditioner bottles. However, in 2017, it went through a rebranding process of its products, launching new lines with more modernized packages of different colours and formats. The concept around all these new lines is that they have "super fruits for super hair" (Garnier Portugal, B, 2020). The products are composed of natural ingredients and have no silicone or parabens.

In Portugal, Fructis is currently positioned behind Ultra Suave, having the second-largest MS in the natural segment of the hair care market, of 7.8%. Although being the second in the market, its MS is still significantly lower than Ultra Suave's MS. However, it has increased its MS by 0.2% since 2018, the same time frame that Ultra Suave started to lose its MS (Briefing L'Oréal Portugal, 2020).

Herbal Essences, founded in 1971, is a daughter brand of Procter & Gamble. Herbal was “born into nature with a free spirit and a joyful heart” and is all about being in freedom to connect with nature and letting go of problems by enjoying life (Herbal Essences UK, A, 2020). Its products contain botanical ingredients sourced from real plants, identified by experts at the Royal Botanical Gardens, KEW, a world’s leading botanical institution, and one of Herbal’s partnerships (Herbal Essences UK, B, 2020). It also has a strong sustainability program to reduce the impact on the Earth’s landfill and water supplies, with several principles including: purchasing renewable energy, reducing manufacturing waste, water reduction, and using beach plastic bottles for a cleaner world (Herbal Essences UK, C, 2020). Another aspect of Herbal Essences is that it is endorsed as a PETA (People for the Ethical Treatment of Animals) cruelty-free brand, meaning that it is formally recognized for having products and ingredients that do not test on animals (Herbal Essences, D, 2020). All the characteristics of Herbal Essences’ products are implemented in a way that makes sure that the final results of the hair are not compromised.

Much like Fructis, in 2018, Herbal Essences went through a rebranding process, with a new relaunch of its logo and general image, “Herbal Essences: bio renew”. This new launch was built around products containing a special blend of ingredients working together to clean, hydrate, and nourish the hair, and it impacted the visual aspect of products, taking a more simplistic approach.

Herbal Essences currently has the third-largest MS share of the natural segment’s haircare market, with 2.6%, falling behind Fructis and Ultra Suave. Although having a significantly lower value than its competitors, similar to Fructis, Herbal Essences has increased its MS by 0.3% since 2018, contrary to Ultra Suave, that lost 2% since 2018 (Briefing L’Oréal Portugal, 2020).

Fructis and Herbal Essences are gaining MS and shoppers from Ultra Suave, so it is key to understand what they are doing to be perceived as natural brands by consumers. An analysis based on the points of parity (POP's) and points of difference (POD's) between Ultra Suave and its competitor brands Fructis and Herbal Essences was therefore conducted, taking into account consumer insights. By investigating these objectives, the aim is to achieve the following: **what can Ultra Suave do in order to better succeed in the *natural products driven consumer segment* than Fructis and Herbal Essences?**

2. Addressing the individual work question

2.1 *Natural products driven consumers*

The *natural products driven consumer segment* consists of individuals who are engaged with the hair care category mainly because they are worried about the composition of ingredients in products being of natural origins. However, the brands they consider may also be based on what has been recommended to them online, from reviews or blogs, since they highly value this. They evaluate their considered brands based on ongoing promotions and on products' price/quality ratio. Additionally, these consumers also care that products guarantee the desired hair appearance is delivered.

Concerning this group's financial capacity, in general, there is a high willingness to spend money on hair care products, so long as they are of the standards they expect. This being the case, brands have few constraints in terms of pricing.

From the quantitative online survey conducted, all 18 *natural products driven consumers* knew at least the name of Ultra Suave, 16 of them knew at least the name of Fructis, and 14 of them knew at least the name of Herbal Essences. The brand attributes considered most valuable to them, in terms of which influence their purchase decisions of hair care products the most, were analysed in *table 2* below. The numbers related to these attributes, classified on a scale of 1 to 5, were obtained by: grouping classifications 1 and 2 as attributes that are not valued, 3 as an

attribute considered indifferent, and 4 and 5 grouped as attributes that are valued a lot for respondents.

Table 1: Most valued brand attributes for natural products driven consumers, with the corresponding number of respondents that said so.

Most valued brand attributes	Number of respondents
Natural ingredients	18/18
Final hair appearance	18/18
Price/quality relationship	18/18
Fit all types of hair	16/18
Good fragrance	16/18
% of ingredients visible at the front of packages	15/18
Products are cruelty-free	14/18
Good promotions	14/18

The characteristics of this segment and the attributes valued by them regarding hair care products will be taken into consideration throughout the remainder of the analysis.

2.2 Points of parity and points of difference between Ultra Suave and its main competitor natural brands

To understand how Ultra Suave can be perceived as a natural brand when compared to what Fructis and Herbal Essences are currently doing, an analysis of the points of parity, and the points of difference of Ultra Suave with each brand was done.

In the Portuguese market, Ultra Suave currently offers fourteen different lines of products, Fructis offers eleven different lines, and Herbal Essences offers twelve different lines. In terms of pricing, Ultra Suave has the advantage in the following product categories: shampoo, charging €13.98/Lt, conditioner, charging € 13.98/Lt, and mask, charging €22.30/Lt. Fructis has the advantage in the leave-in conditioner product category, charging the lowest price per litre, of €19.98/Lt, and Herbal Essences has the advantage in the oil product category, charging €57.90/Lt (Appendix 1).

The following tables summarize the remaining POP's and POD's in terms of the products, the “naturalness”, the sustainability, and the communication of each brand.

2.2.1 Fructis

Table 2: POP's and POD's between Ultra Suave and Fructis

	Fructis' POD	Fructis' and Ultra Suave's POP	Ultra Suave's POD
Products	<p><u>Lines</u>: products for curly, and thin hair, and for anti-dandruff issues. Has a Hair Food line, addressing more of the characteristics valued by the <i>natural products driven consumers</i>.</p>	<p><u>Lines</u>: products for normal, dry, damaged, hard to straighten, frizzy, and oily hair.</p> <p><u>Categories</u>: shampoo and conditioner, and in some cases mask, and leave in conditioner.</p> <p><u>Packages</u>: all include at the front the main ingredients contained, the type of hair that the product is for, and the result the product will deliver. Labels are written in Portuguese entirely.</p>	<p><u>Lines</u>: products for blond, delicate, dehydrated, exposed to sun, and children's hair.</p> <p><u>Categories</u>: oil, heat protect spray, dry shampoo, and solid shampoo (that has been recently launched) in some of its lines.</p>
"Naturality"	<p>Concerning the Hair Food Line</p> <p><u>Natural ingredients</u>: clearly states in the front of packages that its formulas are 98% of natural origins (Appendix 3). Ingredient origins are displayed in an easy-to-read way, at the back of packages (Appendix 3).</p> <p><u>Vegan</u>: clearly stated at the front of packages.</p>	<p><u>Natural ingredients</u>: Packages mention at the front that they contain no silicone or no parabens.</p> <p>Mention ingredients present at the back of packages, in small letters.</p>	<p><u>Natural ingredients</u>: At the back, icons are included to explain that recipes are authentic for the hair, and depending on the line, they either have the identification of being vegan, or that ingredients are natural (Appendix 2).</p> <p>Solid shampoo lines include percentage of ingredients of vegetable origin, 94%, at the front.</p>
Sustainability	<p>Concerning the Hair Food Line</p> <p><u>Packages</u>: material is malleable, giving the sense that packages contain less plastic.</p> <p><u>Recycling</u>: 100% recyclable, excluding the lid, stated at the front of the packages.</p>	<p><u>Packages</u>: brand's sustainability commitments, including that products are developed in factories committed to sustainable development, at the back.</p> <p><u>Recycling</u>: packages partially made of recycled plastic, and are 100% recyclable, excluding the lid, stated at the back.</p> <p><u>Sourcing</u>: committed to solidarity sourcing to help farmer's working conditions, as well as to help the local economy (Garnier Portugal, C, 2020).</p>	<p><u>Packages</u>: icons included at the back of packages, explaining that recipes are authentic for the planet. Include the fact that ingredients are renewable (Appendix 2).</p>

Given that Ultra Suave and Fructis' website and social media pages are the same, as both are communicated through their mother brand, Garnier, there are only POP's in this table.

Table 3: POP's of the communication between Ultra Suave and Fructis

Fructis' and Ultra Suave's POP	
Communication	Website
	<p><u>Brand's products:</u> website section for all Garnier's brands, with all respective products split by their different lines. The selection of a product leads consumers to a page with very brief information given about what ingredients it contains, and what the result of the hair will be.</p> <p><u>Hair care section:</u> explains what the necessary care for each type of hair is and shows the adequate products for each.</p> <p><u>Tips and tutorials section:</u> split by hair needs, types of hair, and others.</p> <p><u>Garnier's story section:</u> the brand's history since the beginning.</p> <p><u>Ingredients section:</u> list of ingredients present in its products, explaining them to a greater amount of detail.</p> <p><u>Follow us and contacts section:</u> At the bottom of the website, there are links to its Instagram, Facebook, and Youtube social media pages, as well as a link to the company's contacts.</p>
	Instagram
	<p><u>Account:</u> Instagram page is of Garnier Portugal.</p> <p>Garnier Portugal has 76,400 followers, with on average 6 posts per month.</p> <p><u>Engagement rate:</u> 0.81%, calculated by dividing the sum of the average likes per post, 574, and the average comments per post, 44, by the total followers. The last 10 posts were considered to calculate the average likes and comments. Garnier tries to maintain an interaction with users, by frequently answering people's comments on posts.</p> <p><u>Content:</u> page description stating that it is a sustainable brand, has products with natural ingredients, and is committed to Green Beauty, including a website link of where consumers can find these commitments.</p>
Youtube	
<p>Channel has different playlists of its different brands and of some lines. It then has videos uploaded outside the playlists. Videos advertise the brand's products, and some have celebrities in them, acting as brand ambassadors, to reach more people: for Fructis it is actress Kelly Bailey, and Ultra Suave has singer Sara Tavares, singer Carolina Deslandes, and actress Margarida Vila-Nova.</p>	

2.2.2 Herbal Essences

Table 4: POP's and POD's between Ultra Suave and Herbal Essences

	Herbal Essences' POD	Ultra Suave's and Herbal Essences' POP	Ultra Suave's POD
Products	<p>Lines: products for fine, flat hair, for coloured, and for curly hair. Also have a sulphate free line.</p> <p>Packages: labels written in Spanish and Portuguese</p>	<p>Lines: products for normal, dry, damaged, and oily hair.</p> <p>Categories: shampoo and conditioner, and in some cases, mask, or oil as well.</p> <p>Packages: include at the front the main ingredients contained, the type of hair the product is for, and the result to be delivered.</p>	<p>Lines: products for blond, delicate, dehydrated, frizzy, exposed to sun, hard to straighten, and children's hair.</p> <p>Categories: leave in conditioner, heat protect spray, dry shampoo, and solid shampoo (that has been recently launched) in some of its lines.</p> <p>Packages: labels written entirely in Portuguese.</p>
"Naturality"	<p>Natural ingredients: sulphate free line includes 93% natural origins, and other lines are 90%, stated at the front of packages.</p> <p>Packages: Emphasize connection to nature through visual imagery of plants and flowers (Appendix 4).</p> <p>Partnerships: include label "Real Botanicals", with the logo of the Royal Botanical Gardens, at the front of packages.</p> <p>Cruelty-free: endorsed as a PETA cruelty-free brand.</p>		<p>Natural ingredients: Mention ingredients present at the back of packages, in small letters.</p> <p>Natural ingredients: Packages mention at the front that they contain no silicone or no parabens.</p> <p>At the back, icons are included to explain that recipes are authentic for the hair, and depending on the line, they either have the identification of being vegan, or that ingredients are natural (Appendix 2).</p> <p>Solid shampoo lines include percentage of ingredients of vegetable origin, 94%, at the front.</p>
Sustainability	<p>Energy: purchase certified renewable electricity, from windmills. Manufacturing sites reduced total absolute energy and gas emissions (Herbal Essences UK, C, 2020).</p>	<p>Recycling: packages are partially made of recycled plastic, and are 100% recyclable, excluding the lid, stated at the back.</p>	<p>Packages: sustainability measures presented at the back of packages, including that ingredients are renewable.</p> <p>Sourcing: committed to solidarity sourcing to help farmer's working conditions, as well as local economies (Garnier Portugal, C, 2020).</p>

Table 5: POP's and POD's of the communication between Ultra Suave and Herbal Essences

	Herbal Essences' POD	Ultra Suave's and Herbal Essences' POP	Ultra Suave's POD
	Website		
Communication	<p>Possesses its own website, independent of its mother brand, and is not specific to Portugal.</p> <p>Brand's products: products split by hair needs, hair types, product forms, and collections, with very detailed information. Additional information includes: partnerships, fragrance explanation, cruelty free, colour safe and pH balanced.</p> <p>Formulas with high standards: verified by trusted partnerships.</p> <p>The "No no no list": a list of all harmful ingredients excluded from Herbal's products.</p> <p>Safety: safety measures taken, in steps, for the understanding of consumers that the brand takes science-based processes to ensure their safety when using products.</p> <p>"what's in your bottle and why" section: glossary of all ingredient names used in products, and the purpose of their use, providing consumers with the most transparency possible.</p> <p>Brand's partnerships: detailed explanation on its partnerships.</p> <p>Live chat area: ability to ask questions.</p>	<p>Brand's products: website section for all products with information on the ingredients contained, and on the results given to the hair. There is also a review classification of up to 5 stars, and customers are able to read each review made.</p> <p>Ingredients section: list of ingredients present in its products, explaining them to a greater amount of detail.</p> <p>Brand's philosophy: the brand's history since the beginning, as well as its sustainability measures.</p> <p>Hair care: explains what the necessary care for each type of hair is, and shows the adequate products for each.</p> <p>Follow us and contacts section: At the bottom of the website, there are links to its Instagram and Facebook social media pages, as well as a link to the company's contacts</p>	<p>Inserted on the website of its mother brand and is specific to Portugal.</p> <p>Brand's products: section showing products is organized by the different daughter brands of Garnier, and within those, by their product lines. Very brief information is given about each product.</p> <p>Tips and tutorials section: split by hair needs, types of hair, and others.</p> <p>Follow us and contacts section: link to its Youtube social media page.</p>

Table 6: POP's and POD's of the communication between Ultra Suave and Herbal Essences

Communication	Herbal Essences' POD	Ultra Suave's and Herbal Essences' POP	Ultra Suave's POD
	Instagram		
	<p>Account: possesses own independent page, with 3291 followers.</p> <p>Engagement rate: 3.5%.</p> <p>Content: page description mentions: products contain natural ingredients certified by KEW, and cruelty-free products certified by PETA.</p> <p>A section with "Q&A", to see frequently asked questions and answers.</p> <p>All posts have backgrounds of nature, plants and flowers, showing connection to nature.</p> <p>Frequent posts about giveaways, where putting a like or a comment could enable consumers to get prizes, which generates huge amounts of engagement.</p> <p>Face of the brand: Portuguese celebrity actress Catarina Gouveia, also known for having a healthy lifestyle, and being a nature lover.</p>	<p>Account: both have a specific page for Portugal.</p> <p>Engagement rate: calculated by dividing the sum of the average likes per post, and the average comments per post, by the total followers. The last 10 posts were considered to calculate the average likes and comments.</p> <p>Content: majority of posts are pictures, with some occasional videos.</p>	<p>Account: Garnier Portugal's page, which has 76,400 followers, with on average 6 posts per month.</p> <p>Engagement rate: 0.81%. Garnier tries to maintain an interaction with users, by frequently answering people's comments on posts.</p> <p>Content: page description stating that it is a sustainable brand, has products with natural ingredients, and is committed to Green Beauty, including a website link of where consumers can find these commitments. Its posts usually present its products on plain backgrounds.</p> <p>Face of the brand: Portuguese celebrities including singer Sara Tavares, singer Carolina Deslandes, and actress Margarida Vila-Nova.</p>
Youtube			
	<p>Youtube channel is of global Herbal Essences, with 18,500 subscribers. Includes videos of hair styling and of its partnerships. Portuguese celebrity actress, Catarina Gouveia, acting as the brand ambassador.</p>	<p>Have videos uploaded outside the playlists.</p> <p>Videos advertise the brand's products, and some have celebrities in them to reach more people.</p>	<p>Youtube channel is of Garnier Portugal, has 12,000 subscribers, and includes playlists of its different brands.</p> <p>Portuguese celebrities including singer Sara Tavares, singer Carolina Deslandes, and actress Margarida Vila-Nova, act as the face of Ultra Suave in some videos.</p>

2.3 What do consumers value that its main competitor natural brands are doing?

The quotations used follow the format: (Occupation, age, brand recently bought).

2.3.1 Fructis

From the quantitative online survey, the most valued characteristics by consumers concerning the brand Fructis were stated. The results its products give to the hair are good (stated by 14 of the 16 respondents that knew at least the name of Fructis), its products are adequate for all types of hair (14/16 of the respondents), the fragrance is good (14/16) and the brand is considered to be modern (14/16), as opposed to traditional, the case of Ultra Suave. This last factor is proof of the rebranding strategy of Fructis having been a success, because even though the brand has been present in the market for a long time, consumers relate to it as having innovative products. The new hair food line, especially, is the line that gives this perception of Fructis to consumers. Other than this, respondents believe that Fructis' packages are attractive (13/16 of the respondents), and that it is an affordable brand (13/16), with the majority valuing its good promotions. Moreover, although *natural products driven consumers* value "naturalness" of products, only some believe that Fructis' products contain natural ingredients (8/16 of the respondents). However, these same respondents believe that its products are vegan (8/16), and that the brand in general is very sustainable (8/16). These respondents make these statements with the hair food line in mind: *"For me, Fructis is the most natural brand at the supermarket because of the hair food line that is made of 98% natural ingredients."* (Student, 30, Fructis). Concerning what consumers are valuing from Fructis' communications, it was seen that in terms of offline communication the brand is often recommended by friends and family (stated by 13/16 of the respondents), so there is word of mouth. Concerning online channels of communication, only half (8/16) think that the brand is being recommended through blogs or social media, with the other half not even knowing, meaning that either they do not check or follow the brand's pages, or they do not recall what they are posting about.

2.3.2 Herbal Essences

From the quantitative online survey carried out, the characteristics and attributes most valued by consumers of Herbal Essences' products and communication strategies were stated.

Firstly, with regards to the products, all 14 respondents that knew at least the name of Herbal Essences mentioned that they deliver good results and outlined that its fragrances are very good. Then, the majority of respondents stated that the products are adequate for all types of hair (stated by 12/14), and that they are quite affordable (12/14), with most saying that the brand's promotions are good (9/14). The majority also believed that the products contain natural ingredients in their compositions (11/14), with some respondents saying that its products have vegan formulae (7/14): *"Everything about Herbal from the name, smell to logo reminds me of naturality. The brand is amazing not only for the results, but because it is cruelty-free certified by PETA."* (Student, 25, Herbal Essences). Finally, some think that its packages are attractive and modern (9/14). Concerning the way the brand is communicating itself with consumers, one of the most important factors, mentioned by many respondents, was that they could perfectly recall advertisements (by 9/14 of the respondents). However, in terms of the brand's spread through word of mouth, few respondents believe the brand is being recommended either online or offline (4/14). Regarding social media pages, the few respondents that follow the brand, think that its communication is good, and its content is particularly attractive (5/14).

3. Implications for Ultra Suave

Ultra Suave is currently not affirming itself as the most natural brand in the market since some consumers still make associations of the brand having plastic packages and chemical ingredients, and some believe there are simply other brands that better fulfil their needs. Moreover, besides Fructis and Herbal Essences already having a strong position in the market, they have been gaining MS in the past years, posing an added threat to Ultra Suave. Therefore, Ultra Suave must adjust its positioning to better succeed in capturing the *natural products*

driven consumers. Firstly, there are essential characteristics that all brands must have to be perceived as natural. These are the category points of parity, based on what was common to the three brands in the above analysis: product lines being distinguished by ingredients contained, the types of hair they are for, and the results aimed to deliver; brands' websites providing information on product lines, with customer reviews, and having a section for their products' ingredients; and Instagram pages stating that their products are natural and sustainable.

The common features of Fructis and Herbal Essences, that Ultra Suave is missing, are also worth analyzing. As long as Ultra Suave's direct competitors have extra features in their products, it will never be able to fully be considered a natural brand. The main points of parity between those two brands, that Ultra Suave should adopt are the transparency in communication on all its product packages, reflected by the **percentages of ingredients of natural origins** being stated at the front, and creating a product **line** for **curly** hair. These are competitive points of parity that Ultra Suave must gain, to be at the same level as Fructis and Herbal Essences.

It is also important to consider the points of difference of each competitor brand, since if they are managing to differentiate themselves in a way that consumers are valuing, then Ultra Suave may want to consider similar approaches. Considering their points of difference and the consumer insights obtained, Ultra Suave should:

1. Be **more transparent** in its online communications with consumers. Ultra Suave could develop its own website and social media page, to be recognized as an independent brand, making the distinction between itself and Garnier clearer, preventing its image to be blurred.
2. **Partner** with institutions that can certify its products for their "naturalness" and sustainability characteristics since this has proven to increase brands' credibility.
3. Explore the use of **visuals** of **nature** on product packages, and on advertisements, not only to attract more consumers, but most importantly, to emphasize its product origins and brand foundations. Investing in influencers that share its values could also enhance this.

Besides following competitors' points of difference, Ultra Suave should also have its own so that it can distinguish itself in the market. It already has some points of difference, but it could also invest in others, by considering what *natural products driven consumers* value, that is not yet being one. Taking this into consideration, Ultra Suave should:

1. Continue to invest in **extensions** and **innovations** to its **solid shampoo** product category, seeing as it fulfills several characteristics valued by *natural products driven consumers*.
2. Make **extensions** of its **dry shampoo** and **heat protect spray** waterless products to more of its lines, providing consumers with more options. A recent trend shows that waterless products are expected to grow in the next years for sustainability reasons including water reduction and for reasons of being practical and saving time (Vogue, 2020). As such, they are worth an investment.
3. Make **adjustments** on its **packages**, making them as **sustainable** as possible, by using the least amount of plastic. **Refill bottles** made of aluminium could be a solution since they are refilled from flexible plastic packages that contain much less plastic than a normal one. This is something that is currently still not present in the hair care mass market, but that Procter & Gamble has announced to do in 2021 (Appendix 5).

4. Limitations

The first limitation identified was that the *natural products driven consumer segment* is composed by 18 respondents and so, the small sample size may mean results are not as accurate. Secondly, since Fructis and Ultra Suave share the same social media pages, it is unclear which consumers are following the page for which brand. Finally, given that Herbal Essences' does not have a Portuguese website, information was taken from the brand's foreign websites, from checking the products available at Portuguese supermarkets online, and from in-store observations. As such, the information may not be entirely accurate.

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APPENDICES

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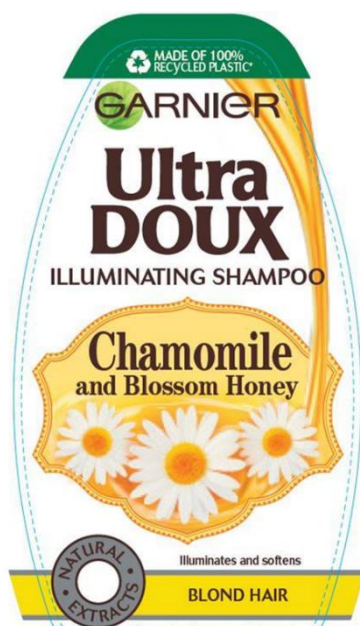
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Appendix 1. Pricing by product categories between Ultra Suave, Fructis and Herbal Essences

	GARNIER Ultra SUAVE	GARNIER FRUCTIS	Herbal Essences
Shampoo	 €13,98 /Lt	 €14,98 /Lt	 €14,48 /Lt
Conditioner	 €13,98 /Lt	 €19,95 /Lt	 €14,48 /Lt
Mask	 €22,30 /Lt	 €23,05 /Lt	 €23,16 /Lt
Oil	 €59,93 /Lt		 €57,90 /Lt
Leave-In Conditioner	 €24,95 /Lt	 €19,98 /Lt	
Heat Protect Spray	 €33,27 /Lt		
Dry Shampoo	 €53,27 /Lt		

Appendix 2. Ultra Suave's front and back of packages



Appendix 3. Fructis hair food line's front and back of packages



Appendix 4. Herbal Essences' front of packages



Appendix 5. Procter & Gamble's Refillable Shampoo Bottles for 2021

